

**Willamette Action Team for Ecosystem Restoration (WATER)
Research, Monitoring and Evaluation (RM&E)**

October 27, 2016

http://www.nwd-wc.usace.army.mil/tmt/documents/FPOM/2010/Willamette_Coordination/Steering_team/WST.html

Facilitator's Summary

ACTION	RESPONSIBLE PARTY	BY WHEN?
Send Doodle poll for 11/17 & 11/18 to RM&E members and researchers for November meeting.	DSC	ASAP
Review draft MF RM&E plan and provide comments to Rich & Stephanie.	RM&E Team	ASAP
Provide edits to the 9/22, 10/4 and 10/12 meeting summaries.	RM&E Team	11/4
Meet with ST member to discuss questions/points raised in elevated issue papers and the MF RME Plan.	RM&E Team	Before 11/10
Discuss MF PSM study with ODFW & report back to RM&E	Cam	11/17 meeting
Review and provide comments on FY17 proposals	RM&E Team	11/25
Work with researchers to develop proposals for concepts	Rich	Ongoing
Clarify ISAB/ISRP review request	RM&E Team	Feb/Mar 2017

Participants in the room: Leslie Bach (NPCC), Stephanie Burchfield (NMFS), Tom Friesen (ODFW), Mike Hudson (USFWS), and Rich Piaskowski (USACE);

Participants on the Phone: Chris Caudill (UI), Brad Eppard (USACE), Melissa Jundt (NMFS), Matt Keefer (UI), Jim Peterson (OSU), and Cameron Sharpe (ODFW);

Facilitation Team: Donna Silverberg, Emily Stranz and Tory Hines, DS Consulting

Welcome and Housekeeping

Emily Stranz, DSC, welcomed the group and explained that the purpose of the day's session was to discuss and reach consensus on research, monitoring and evaluation needs of the Willamette system and projects in order to support decisions that will be made by managers. Emily welcomed Leslie Bach, NPCC, to the RM&E Team. Leslie will be representing NPCC at the RM&E team; her background is in hydrology and water resources and she has worked on the Willamette system for years.

RM&E team members asked for more time to review the meeting summaries. All edits should be e-mailed to Emily by Friday, November 4th. Emily will incorporate edits and send final summaries back out to the group. If there are no additional comments, summaries will be considered approved.

- **ACTION:** RM&E members will provide additional edits to the 9/22, 10/4, and 10/12 meeting summaries by Friday, November 4th. Edits should be sent to emily@dsconsult.co.

Emily shared that the RM&E meeting materials will be posted to a RM&E page on the Willamette Coordination website (URL listed in the header of this summary). Materials on the website include agendas, summaries and presentations provided during RM&E meetings. Steering Team materials are also available at the above link.

The November meeting needs to be rescheduled as it falls on Thanksgiving. Emily will send another Doodle poll for November 17th and 18th, so that the team can use this session to discuss project proposals with the researchers. Project proposals will be sent out to the RM&E Team by November 11th, they will have until November 25th to provide comments on the proposals.

- **ACTION:** Emily will poll RM&E members and researchers to schedule the November RM&E meeting. Rich will send the projects proposals to the RM&E team on November 11th. The RM&E team will provide comments on the proposals to Rich by November 25th.

Updates and Report Backs

Emily noted that the September and October meeting action items have been completed. She thanked RM&E members for finishing their tasks in a timely fashion.

Willamette Fisheries Science Review: Rich Piaskowski, USACE, noted that the Willamette Fisheries Science Review will occur on February 7-9th in Corvallis. He encouraged RM&E and Steering Team members to attend.

Independent Science Review: Rich asked the group for input on whether or not they should seek ISAB and/or ISRB review on the following projects:

- Adult upstream passage
- Juvenile downstream passage
- Middle Fork RM&E Sub-basin Plan and associated FY17 proposals
- Instream flow recommendations for the Willamette River Basin

Rich explained that independent scientific review would provide helpful feedback for the RM&E team. Leslie suggested that ISRP/ISAB review should happen before the proposals are finalized so that the proposals can utilize the Board's input, to which Rich agreed that it would generally be best to have ISRP/ISAB review proposals before they are finalized, but further responded that many of the projects are multi-year projects and thus can utilize input even on final the FY17 proposals. The team discussed what the review would look like, noting that it would take place after the WATER teams have reviewed the Middle Fork RM&E Sub-basin Plan and the FY17 proposals and the RM&E Team would work together to clarify the "ask" of the ISRB/ISAB. They also considered whether or not an independent review should be built into the annual RM&E process – this topic was tabled, however, generally supported.

- **ACTION:** The RM&E team will work together to clarify the "ask" for ISRB/ISAB review and aim to submit the proposals for review in February/March 2017 (depending on the WATER review timeline).

RPA & COP Requirements: Donna Silverberg, DSC, reported back from the October Steering Team and G4 meetings. She shared that the Managers are determined to help clarify direction regarding implementation of the RPA, COP and HGMPs. Donna noted that the managers are well aware of the confusion that has surfaced due to the multiple documents and the varying levels of guidance from each document. At the October 14th Steering Team meeting, the group coalesced around the RPA as the overarching plan that needs to be implemented. The COP provides a finer point on some, but not all of the RPA measures, and the draft HGMPs provide additional detail for specific aspects of the implementation. She noted that the G4 is working to clarify which document drives various aspects of the RM&E, and how, with an eye towards clarifying management questions and assumptions. The goal is to get the managers aligned in their thinking and then to bring in the technical teams.

Stephanie Burchfield, NMFS, was supportive of bringing the managers and technical teams together for discussion to ensure that the Steering Team is aware of the technical aspects of the RPA and COP. Mike Hudson, USFWS, affirmed that the technical team needs a decision from the managers regarding what documents drive RM&E. He continued that from his understanding, the COP is the vehicle by which USACE gains authorization for funding operations; he asked whether making modifications to the COP is a possibility. Rich agreed with Donna that the COP provides a finer point on the path forward for some, but not all of the RPA measures, and noted that the recommendations from COP are now documented in the Corps' 5-year plans. Although the COP is completed, the 5-year plans are living documents which will be updated annually based on new information and decisions. Rich also mentioned that the decision path for each project is iterative, and will be documented through the engineering process in EDR's, DDR's and P&S.

Donna shared that the G4 is scheduled to meet on November 8th to begin the RPA/COP alignment discussion and they will provide updates to the Steering Team and RM&E Team on their progress at the November 10th Steering Team meeting. She encouraged RM&E Team members to connect with their Steering Team member prior to the meeting.

Steering Team input on elevated issues: Donna reported that the Steering Team reviewed and discussed the three issue papers elevated to them by the RM&E Team during their October meeting. In discussing, it became clear that the Steering Team had many of the same questions across the three issues. Thus, they decided that in moving forward with future elevations, the following questions would be helpful to have the technical team address:

1. What are the compelling points motivating the need or lack of need for this (e.g. is the primary investigator retiring? Does it cost a ton and the money is needed elsewhere? Or...)?;
2. What management decisions are you trying to answer with this test?
3. What are the assumptions you are trying to test? [*Facilitator's Note: The RM&E Team clarified that hypotheses are being tested, not assumptions; this question should be edited to read: what are the hypotheses that you are trying to test?*]

She continued that the Steering Team felt that RM&E team members should focus on the technical issues and allow the Steering Team to address cost issues and funding priorities, however, it is good to know if there are efficiencies gained or lost.

Stephanie noted that the agencies have different ways of interpreting "management decisions" and that it is important for the managers to understand that one study does not answer the management question, instead, it answers a part of the question. She suggested that moving forward, elevation discussions at the Steering Team should include technical staff in order to answer questions and provide clarity. Other RM&E Team members present generally agreed that it would be more efficient to have these discussions together.

In regards to the paired release study that was elevated, Donna relayed a question on to the RM&E Team regarding the urgency of the analysis and if the raw data would be helpful. Rich noted that this data does not support a management decision in 2017. Tom Friesen, ODFW, noted that the raw data is public information and easily available, however, Stephanie noted that the raw data is not very helpful and that the calculations to convert it into useful information are difficult to do.

Donna asked that RM&E members connect with their agency's Steering Team member to discuss the important points/questions raised in the issue papers and Steering Team summary. For the elevation process to work best, conversations between both teams must occur in advance of the Steering Team meeting.

- **ACTION:** RM&E members will meet with their agency's Steering Team member and review the three issues papers submitted for elevation. The issue papers and agency questions will be addressed at the November 10th meeting.

Middle Fork Sub-basin RM&E Plan: Donna shared that the Steering Team looked at the two Middle Fork Plan summaries, however, they have not yet seen the full plan. The Steering Team expressed interest in clearly communicating the *why* behind the RM&E needs. They also would like to have the entire plan completed and reviewed by the December 1st Managers' Forum meeting.

To help move the draft plan forward, Rich and Stephanie requested that the RM&E team review the plan for fatal flaws. Mike suggested that RM&E members brief their agency's Steering Team members on any concerns raised during their review of the draft plan. Donna will e-mail the draft Middle Fork Sub-Basin Plan to the Steering Team and let them know that the RM&E Team is in the process of reviewing it for fatal flaws.

The RM&E Team briefly discussed the Middle Fork plan. Rich noted that it is a work in progress and it would be helpful if the RM&E Team helps to identify holes in the logic. He explained that the intent is to provide basic background, identify the management questions and study needs to determine the success of upstream and downstream passage and, overall, the likelihood that a sustainable spring Chinook population could be established above MF dams. He noted that reservoir survival and pre-spawn mortality are key aspects of this plan.

Stephanie suggested using a Gantt chart to clearly define the timeline. Mike noted that there is a check-in during FY19; however, there will not be enough information at that point to make a decision on the feasibility of passage and a sustainable population. He asked that it be made clear that the FY19 check in is not a "go/no-go" decision point. Stephanie stressed that the FY19 check in is an opportunity to review available data and shift the RM&E approach if needed.

- **ACTION:** RM&E team members will review the draft Middle Fork Sub-Basin Plan and provide comments to Rich and Stephanie ASAP. RM&E members will also discuss the plan with their agency's Steering Team member prior to the November Steering Team meeting.
- **ACTION:** Rich and Stephanie will clarify that the FY19 check in is not a "go/no-go" decision point, it is a process check in.

Continue Conversation on FY 17 RM&E

APH-17-01-MF Middle Fork Pre-Spawn Mortality Study:

Jim Peterson, OSU, and Cam Sharpe, ODFW, presented a description and evaluation of study design for a Middle Fork pre-spawn mortality study (handout provided on RM&E website). They noted that at the October 12th RM&E Team discussion they were tasked with determining the need and availability of fish for this study. After considering the factors to test and availability of fish, they determined that it is likely feasible to test for five factors. They provided a prioritized list of factors and discussed them with the RM&E Team. It was suggested that the time of day for outplanting may be worth testing instead of the holding time at the facility because the hatcheries are already implementing best practices for holding fish and the outplanting time has not been studied. Cam suggested considering the factors and what management decisions could be derived from the outcomes, for instance, if long travel time proves to be detrimental, maybe a cold pool at the end of the transport could be beneficial before release. Mike asked if the analysis could include information on the configuration of the outplanting sites, Cam thought that it could be included.

In regards to whether or not this study would be feasible for ODFW, the group noted that it will require more boots on the ground to gather carcasses. He also noted that they may be able to adjust the

disposition of excess fish (after brood is collected) if there are more fish needed for the study. Cam agreed to talk with Dan Peck, Jeff Ziller, and Ryan Couture regarding potential impacts and feasibility. If ODFW feels that the study is feasible, Cam will draft a proposal for the RM&E Team. He will include an option to expand the study to Fall Creek for the RM&E Team to consider.

- **ACTION:** Cam will discuss potential impacts and feasibility of this study with ODFW and get back to the RM&E Team at the November meeting.

APH-09-01-FOS Evaluate Strategies for Reintroduction Above Foster: Rich shared that following the September RM&E meeting, he added an objective to this concept which would continue to investigate the Chinook fallback at Foster Dam. He noted that Chris Caudill shared with him that they saw benefit from thermal exposure and would benefit from more study. **The RM&E Team agreed to add this objective (all 1's using the Five Fingers of Consensus).**

JPL-17-05-FOS-AFF Recruitment Rates of Fry Below MF Dams: This idea was discussed in detail at the September RM&E meeting and Rich drafted a concept paper which lays out the need, however, not the methods. It was noted that this project is likely a year out due to the timing and it being too late to use hatchery fish. Rich asked the group if the Corps should pursue getting a proposal for this study. **The RM&E Team agreed that the Corps should pursue a proposal for this study (all 1's using the Five Fingers of Consensus).**

APH-15-05-FOS-AFF Foster Adult Ladder: Chris Caudill, UI, shared preliminary results from the Foster adult trap performance study (presentation provided on RM&E website). He noted that the study consisted of block treatments and consisted of two days on, followed by two days off. The study looked at the effects of using the auto weir or holding the weir down. Water velocities are higher when the weir is down and data suggests that the hydraulics at the weir is impacting movement. According to the raw counts, there is higher holding when the weir is in auto-mode. Chris noted that the 2016 results will be available at the Willamette Science Review and the report will follow shortly. He suggested that next steps could be to study and test the pre-sort pool, conduct an active tag study, and continue to monitor PIT tag data. There was some support for the next steps, however, the team wanted to see the data to determine if the questions had been answered before further developing the test factors. Rich noted that due to the funding timeline, it would be a good idea to start drafting a proposal to further test the factors and then refine it after the data is released. **The RM&E Team agreed that UI should draft a proposal to further test the factors, however, it should be refined after the data has been analyzed.**

- **ACTION:** The Corps will pursue proposals for the above listed concepts with the appropriate researchers and bring the proposals back to the RM&E Team for review and comments.

Next Steps

RM&E Team members will connect with their Steering Team member to discuss the elevated issues and the draft Middle Fork RM&E Plan. They will also review the plan and provide edits to Rich and Stephanie. The team will review FY17 proposals and provide comments to the Corps by 11/25 and Emily will set up a time for the group to meet and discuss the proposals either on 11/17 or 11/18. Researchers will continue efforts to draft proposals for the concepts discussed which will later be provided to the team for review.

Emily thanked the group for their work and with that the meeting was adjourned.

This summary is respectfully submitted by DS Consulting. Suggested edits are welcome and can be sent to Tory at tory@dsconsult.co.

